



QUARTERLY INTERNATIONAL MARKETING MEETING

MAY 11-12, 2004

THE MANGUM GROUP
A MARKETING COMPANY



www.hawaii-tourism.de

Where do we stand in 1Q2004?

- **Hawaii recovers – booming bookings after long slack**
- **Not only that length of stay and expenditure have increased, year-to-date booking numbers from Europe have also increased by 6.1% in total***
 - ✓ **Germany: +20%**
 - ✓ **UK: +5.5%**

* March 2004 visitor numbers % in change; source DBEDT



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Where do we stand in 1Q2004?

Continental Europe - Germany:

- ✓ Canusa said its HI sales were up 65% so far for this summer
- ✓ Eest Reisen reported Triple digit increases for HI
- ✓ FTI said summer 2004 revenues were up 41% and client numbers by 50%
- ✓ Neckermann reported similar figures, with the summer showing a 40% rise to date
HI Bookings
- ✓ Sport Scheck/Sun & Fun Reisen, world market leader in surf tours, for the first time Integrated HI Product in their Various Catalogues (circ. 1,3 Mio.)
- ✓ Tchibo, coffee and non-food retail giant in Germany, re-launched HI as single-center destination in its travel program
- ✓ Thomas Cook launched their first North America catalogue with significant HI content and satisfied booking situation



Where do we stand in 1Q2004?

Continental Europe – Belgium, France, Italy, Netherlands:

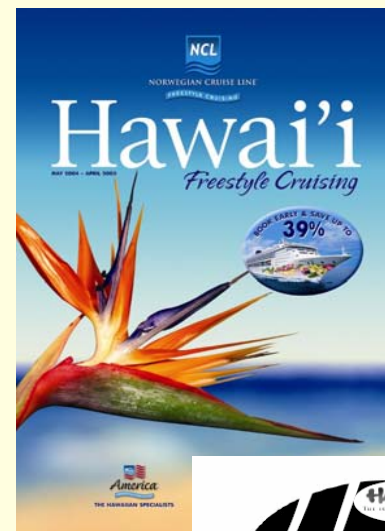
- ✓ **Alitalia to possibly re-launch Milan Malpenso – LAX non-stop flight**
- ✓ **Delta Air Lines to promote new Rome – Cincinnati flight with extension to Honolulu**
- ✓ **Caleidoscopio Viaggi del Ventaglio, Italy reported increases for HI**
- ✓ **Kuoni Gastaldi, Italy to expand HI product**
- ✓ **Wings 'n Wheels, Belgium to expand HI product**
- ✓ **Jetset Voyages, France said summer 04 revenues for HI are up significantly**
- ✓ **Vacances Fabuleuses, France reported double digit increases for HI**
- ✓ **Cruise Travel, Netherlands will increase HI product**
- ✓ **Wereldcontact Reizen, Netherlands HI Bookings are up 1/3rd over last year**



Where do we stand in 1Q2004?

UK:

- ✓ United Vacations 1Q04 HI room nights already surpassed whole of 2003
- ✓ Gold Medal Travel 95% of total 03 HI room nights already achieved by 1Q04
- ✓ Trailfinders HI Bookings up 30% over last year
- ✓ Page & Moy recently re-launched website set for a 128% increase in confirmed web bookings
- ✓ Thomas Cook Signature stand alone brochure in discussion
- ✓ ITC Classics to expand HI product
- ✓ Travel 2 looking to increase HI pages



A promotional brochure for United Vacations. It features the text 'Hawaii 7 nights from £779' and 'For tailor made vacations all across the USA & Canada call 0870 429 2077 or visit www.unitedvacations.co.uk'. It also includes the United Vacations logo and the United Airlines logo. At the bottom, it says 'Don't just go on holiday take a Vacation' and provides contact information: 'ABTA V5630 ATOL 2957' and 'MO804/04'. Small text at the bottom reads 'Prices are per person based on 01 Nov '04 departures. Subject to availability, conditions apply.'



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Marketing & PR Achievements

- ✓ New German speaking Website
Launched at ITB in March 2004
- ✓ New UK Website
Will be launched in June 2004
- ✓ B2B Platform for Trade & Media
- ✓ General trip planning information



Marketing & PR Achievements

ITB Berlin (March 12-16, 2004)



HAWAII
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Marketing & PR Achievements

ITB Berlin (March 12-16, 2004)

- ✓ The world's premier international trade Fair
- ✓ 141.000 Visitors
(75.000 trade visitors, 6.700 Journalists)
- ✓ 100 Trade & Media Appointments
- ✓ Press Conference
- ✓ Presence from all Island Chapters
And other HI Industry suppliers



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Marketing & PR Achievements

Trade & Consumer Shows

- ✓ BIT Milan, Italy
- ✓ Daily Mail Ideal Home Show; UK
- ✓ Honeymoon Show St. Gallen, Switzerland



Marketing & PR Achievements

Travel Agent/Tour Operator Trainings

- ✓ Visit USA Road show Switzerland (600 travel agents)
- ✓ Visit USA Road show Germany (100 travel agents)
- ✓ North America Travel Service staff training
- ✓ Funway Reservation Training
- ✓ Flextravel Staff Training



Marketing & PR Achievements

Hawai'i Supplement in Travel Trade Publication Touristik Aktuell

- ✓ circ. 30.000
- ✓ 3-weekly Hawaii sweepstakes in Touristik Aktuell & online

HAWAII! GEWINNSPIEL

Inmitten des pazifischen Ozeans erheben sich die mächtigen Vulkane Hawai'i aus dem tiefblauen Meer. Mit hunderten Traumstränden in allen Richtungen, satgrüner Vegetation, wehender Vulkanlandschaft und einzigartiger Kultur ist Hawai'i gleichermaßen Traumziel für Sonnenanbeter, Naturliebhaber und Aktivurlauber.

GEWINNEN SIE EINE TRAUMREISE INS PARADIES:

1. Woche auf der Pride of Aloha für 2 Personen sowie Verpflegung auf Hawai'i,
2. Tage im Fairmont Kilauea auf Maui sowie 2 Tage im Fairmont Orchid auf Big Island.

Beantworten Sie die nachfolgenden drei Fragen und faxen oder mailen Sie Ihre Antworten an 0 6146/6 05-205 oder info@touristik-aktuell.de

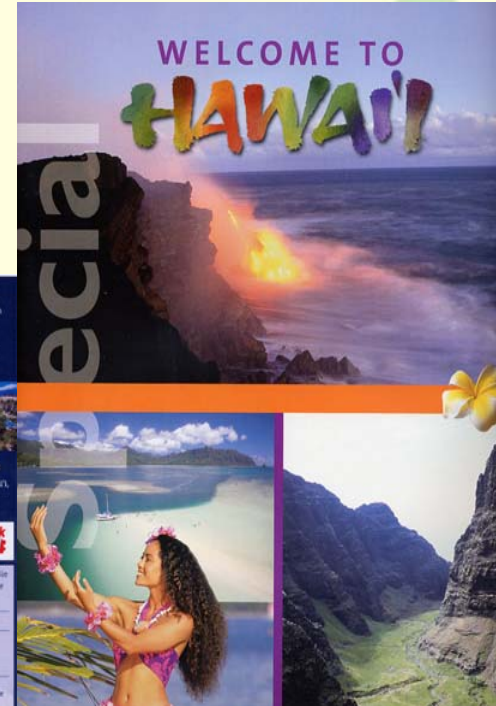
Name: _____ Telefon: _____
Adresse: _____ PLZ/Ort: _____

1. Wie heißt das Fairmont Haus auf Big Island?

2. Auf welchen Schiffen der Reederei NCL können Sie 2004/2005 die hawaiianische Inselwelt erkunden und gleichzeitig das innovative Freestyle Cruising Konzept kennenlernen?

3. Auf welcher Insel Hawai'i befindet sich der einzigartige Hawai'i Vulkan National Park?

Teilnehmen können alle Reisebüromitarbeiter/-innen. Der Richtweg ist ausgeschlossen. Einsendeschluss ist am 13. April 2004.



Marketing PR Achievements

Mothers Day Selfridges/Jetlife Promotion

- ✓ In store leaflet with sweepstake
Distribution: 40.000 in Selfridges, department stores
- ✓ Copy on website
220,000 visitors over 2 weeks
- ✓ In-store Plasma screen:
52 Screens, 2 weeks

Hula Hula!
Fancy treating your Mum to a holiday of a lifetime? Why not enter our competition to win a holiday for 2 to Hawaii with Jetlife Holidays. You can win your Mum away on United Airlines for a 7 night stay at the Hilton Hawaiian Village Beach Resort & Spa, located on 22 tropical acres of Waikiki's best beach. Home to the World renowned Maunaloa Spa and Holistic Hawaii preventative medicine you'll also be encouraged to take part in many of Hawaii's activities including lei making, aqua and hula lessons!



For some great offers call 0870 787 0447 or visit www.jetlife.co.uk

Name

Address

Postcode

E-mail

Cost of item

For full Terms & Conditions, please visit www.selfridges.com



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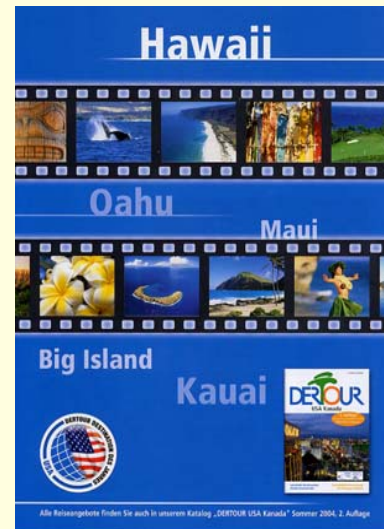
Marketing & PR Achievements

Hawai'i – Dertour Destination of Month

- ✓ Hawai'i Supplement in Geo Saison (circ. 130.000)
- ✓ Hawai'i Window display campaign for 10.400 travel agencies
- ✓ 3 monthly fax mailings to 10.400 travel agencies



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USA Kanada



Hawaii – Trauminseln im Pazifik



Ohana Waikiki Surf Hotel ♦♦
Flug mit Delta ab/bis Deutschland nach Honolulu,
Anreise zum Flughafen, 2 Übernachtungen
Pro Person im DZ ab € 1.104

Verlängerung im Ohana Maui Islander ♦♦, Lahaina
Pro Person im DZ ab € 41

 Gültig vom 1.4. bis 31.10.2004.

Die Nr. 1 für Reisebausteine

Marketing & PR Achievements

Dole & Hawai'i Promotion

- ✓ Pan-European Coop Consumer & POS Campaign
(April – Sept. 2004)
- ✓ More Than 20 mio. Contacts
- ✓ Dole Mini Website



Marketing & PR Achievements

PR Value generated: US\$ 1.6 Mio

Readers reached: 17.907.028

How did we achieve this:

- ✓ **Development of press kit, background information, story line sheets, newsflashes**
- ✓ **Press Mailings**
- ✓ **Individual Press Trips**
- ✓ **Group Press Trips**
- ✓ **TV Coverage**
- ✓ **Radio coverage**
- ✓ **Print Coverage**
- ✓ **Press conferences**
- ✓ **Media luncheons**
- ✓ **Media appointments**

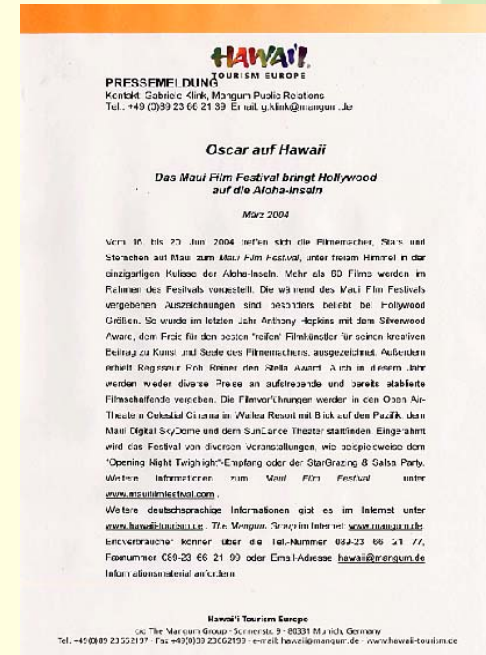


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Marketing & PR Achievements

Press Releases

- ✓ 7 Press Releases in UK & Ireland
- ✓ 12 Press Releases in German speaking markets
- ✓ 2 press releases in Italian and French speaking markets
- ✓ 700 News flashes ITB
- ✓ Story leads sheet
- ✓ Background information sheet



Marketing & PR Achievements

OK! Magazine

- ✓ **Celebrity-focused lifestyle magazine**
- ✓ **Circulation: 570,927**
- ✓ **Media Value: US\$ 137.164**



Marketing & PR Achievements

Travel Weekly

- ✓ Travel trade publication
- ✓ Circulation: 23,711
- ✓ Media Value: US\$ 52.660



HAWAII

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GOLF magazine

- ✓ **Leading golf magazine in Germany**
- ✓ **Circulation: 52.300**
- ✓ **Media Value: US\$ 9.555**



Marketing & PR Achievements

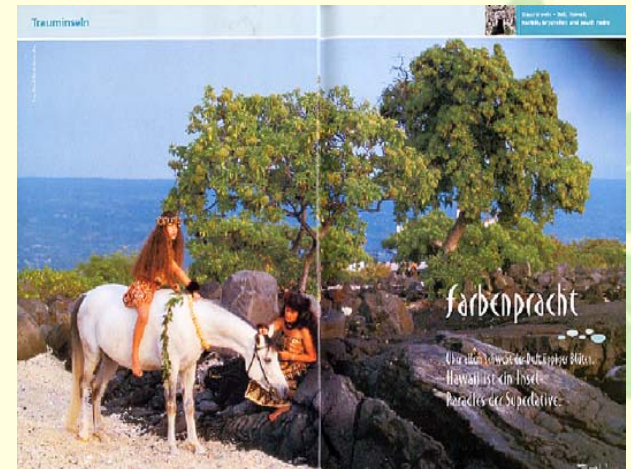
Deutsches Ärzteblatt /Reisemagazin

- ✓ Medical magazine
- ✓ Circulation: 368.500
- ✓ Media Value: US\$ 42.750



Reiten Weltweit

- ✓ **Special interest magazine on horseback riding**
- ✓ **Circulation: 25.000**
- ✓ **Media Value: US\$ 30.625**



Marketing & PR Achievements

The logo for 'überdasZDF' is displayed on an orange rectangular background. The text 'überdas' is in a white, lowercase, sans-serif font, and 'ZDF' is in a larger, bold, white, uppercase, sans-serif font.

überdasZDF

Arte TV

- ✓ **Pan-european TV network**
- ✓ **Belongs to Second German National TV Network ZDF**
- ✓ **Audience 121.000 (France/Germany/Switzerland/Austria)**
- ✓ **TV & online feature**



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Marketing & PR Achievements

Press Fams UK/Ireland

- ✓ Individual Press Fam in February Debbie Blyth, The Sun (Daily National Newspaper)
- ✓ Individual Press Fam in March Tony Barrell, Sunday Times Magazine (national newspaper magazine supplement)
- ✓ Individual Press Fam in April for Ceri Roberts, New Magazine (lifestyle)

Ongoing Projects

- ✓ Continue to lobby UK Travel Programmes, eg ITV's *Love on a Saturday Night* to feature HI



Marketing & PR Achievements

Press Fams Continental Europe

- ✓ **Individual Press Fam in February with freelance journalist Tina Engler**
- ✓ **Individual Press Fam in March with Italian diving magazine Aqua**
- ✓ **Individual Press Fam in March with German consumer travel magazine Reise & Preise**

Ongoing Projects

- ✓ **Radio NRJ Zurich launched Hawaii weeks (Feb 2004)**



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Marketing & PR Achievements

- ✓ **Regular attendance/representation of Hawaii at key industry events:**
 - Travel Weekly Awards and ABTA Trade Lunch (January), -
 - Condé Nast Traveller Reader Spa Awards, British Guild of Travel
 - Writers Yearbook Event and The Independent -
 - Supplement Launch (February) & Sport Diver Magazine
 - Party (March)
- ✓ **Daily contact with key national, consumer, regional and trade journalists as well as niche freelance specialists, from golf and diving to spas.**
- ✓ **Monthly Hills Balfour lunch with up to 8 journalists to discuss story ideas and possible visits to HI**



Overall Marketing & PR Achievements 1Q2004

	Trade	Airlines	Consumer
Trade Contacts	62.400*	60	N/A
Travel Agents trained	844	18	N/A
Inquiries	1.130	52	1.503

* incl. Travel Trade Fax Mailings & HI Special with Touristik Aktuell; 163 pro-active sales calls



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Marketing & PR Achievements

- ✓ Press conferences hosted: 2
- ✓ Press conference attendees: 130
- ✓ Press Releases distributed: 21
- ✓ Journalists received press releases: 14,600
- ✓ Hawai'i stories in Press: 112 (agency generated)
- ✓ PR Value generated: US\$ 1.600.00
- ✓ Readers reached: 17.907.028



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Outlook Major Marketing & PR 2Q2004

- ✓ **Pow Wow & Pan-European Post Pow Wow Hawaii Travel Expo (Coop Sun Islands) Tour Operators and Travel Trade Media from 8 European Countries**
- ✓ **English speaking Hawaii Website & European Newsletter to Trade Partners**
- ✓ **HI Special with UK travel trade press/Golf special/supplement**
- ✓ **Sinn Leffers Hawai'i Retail Product Relationship Promotion (4 minute HI destination feature: 48 stores, 1.5 mio. viewers)**
- ✓ **Halau Hula O'Kawaili'ula to perform at NCL brochure launch to Kuoni's millionaires club (top selling travel agents)**



Outlook Major Marketing & PR 2Q2004

Press Fams

- ✓ **Individual Press Fam in July for Garth West, S Magazine, Sunday Express (national newspaper supplement)**
- ✓ **Individual Press Fam in July for Keely Spencer-King, Star Magazine (celebrity lifestyle magazine)**
- ✓ **Individual Press Fam in November for Tim Ecott, Diver Magazine & Daily Telegraph**
- ✓ **Consumer group press trips proposed for July and October**



Outlook Major Marketing & PR 2Q2004

Press Fams

- ✓ **Individual Fam with Frankfurter Allgemeine Sonntagszeitung in May 04**
- ✓ **Individual Fam with freelance Katharina Büttel in June 04**
- ✓ **Individual Press Fam with Hannoversche Allgemeine Zeitung in July 04**
- ✓ **Group Media Fam with NCL**



Outlook Major Marketing & PR 2Q2004 & Beyond

- ✓ **Thomas Cook Airlines Hawai'i Charter ex Frankfurt & via Las Vegas Discussed for summer 2005**
- ✓ **Thomas Cook UK is evaluating Hawai'i Stand Alone Catalogue for Summer 2005**
- ✓ **FTI, German North America specialist is planning to re-launch annual Hawai'i Stand Alone Catalogue in November 2004**
- ✓ **Flextravel, former TUI Swiss, is evaluating launch of annual Hawai'i Stand Alone Catalogue**
- ✓ **BMT Italy, Top Resa France, WTM UK & EIBTM Spain**

